



MOBILE **AC** PARTNERS  
european association  
for mobile air conditioning services

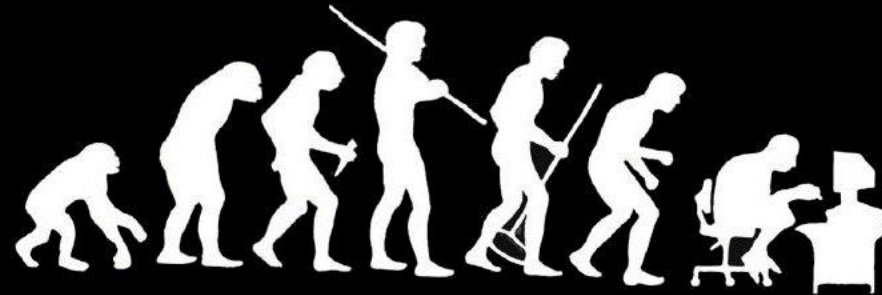
# A GLOBAL EVOLUTION



*Driving  
Industry  
Excellence*

# EVOLUTION ???

- ▶ The process of accumulating CHANGE and the challenges it brings !



Something, somewhere went terribly wrong

# CHANGE and CHALLENGES

- ▶ High number of vehicles requiring regular service
- ▶ Multiple refrigerants
- ▶ Uncertainty of Legislation regarding working standards
- ▶ Compliance with Environmental requirements
- ▶ OEM “protectionism”

# Passenger Vehicle Climate Control

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1970's  
Luxury  
5% of vehicles

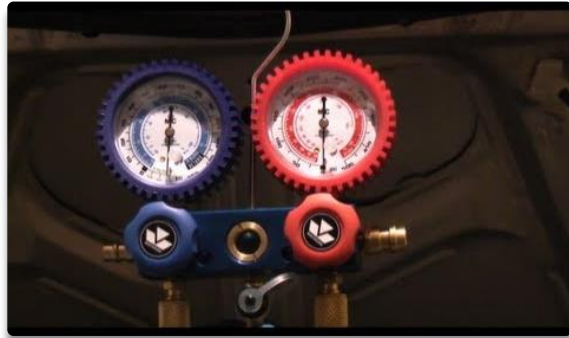


1990's  
Desirable and standard  
Up to 80% of vehicles



2016  
Essential  
Nearly 100% of vehicles

# Refrigerant Evolution



1970's  
CFC R12

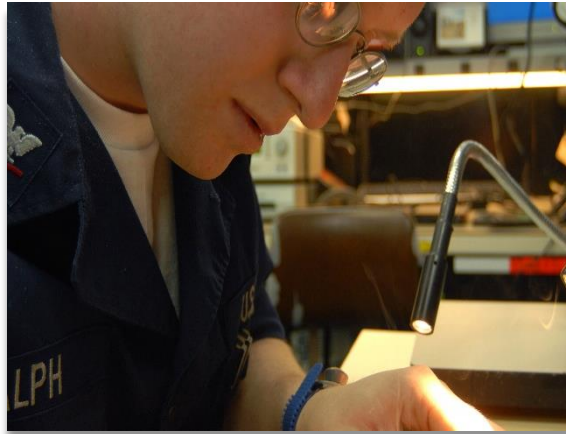


1990's  
HFC R134a



2016  
HFO 1234yf  
Natural Refrigerants

# Service providers



1970's

Small number  
of "Specialists"



1990's

Increasing  
"gas and go"  
availability



2016

Trained technicians  
at most service  
providers



# LEGISLATION

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- ▶ With new low GWP refrigerants possibly not covered by current legislation, the concerted and unified efforts of the various trade associations around the world to lobby both the legislators and the industry itself to ensure the highest level of professional service for the vehicle climate control systems becomes even more important !



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OEM

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## ► Connected car technology





# Environmental

- F'gas Regs will continue to be in place as long as high GWP refrigerants (R134a) remain in use.
- **MACPartners along with our affiliate partners will continue to lobby European and Global legislators to ensure a fair deal for our industry specialists**





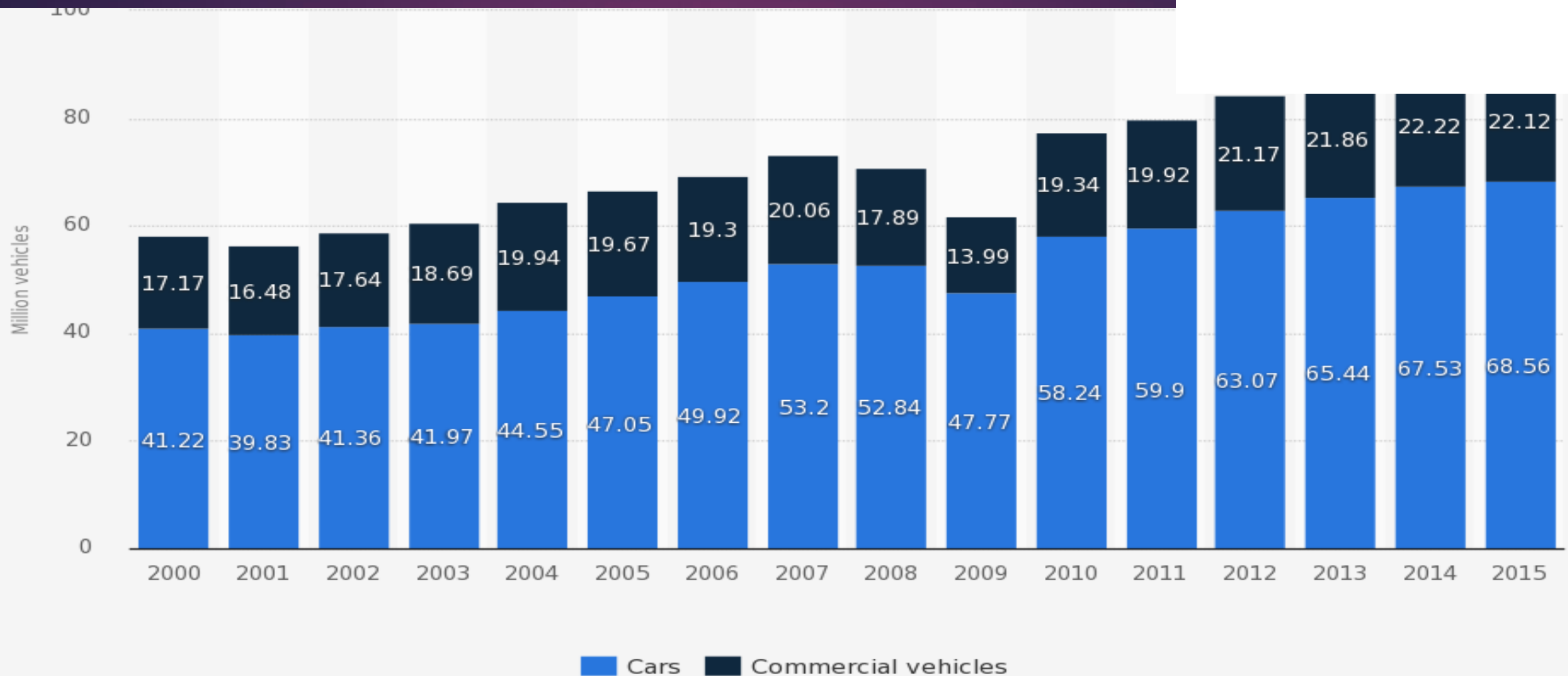
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**INDUSTRY**

# Annual production numbers of Vehicles

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# Passenger Vehicle Climate Control

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1970's  
**Luxury**  
**2 million vehicles**



1990's  
**Desirable and  
standard**  
**45 million vehicles**



2016  
**Essential**  
**80 million vehicles**

# One Unified Voice

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*Driving  
Industry  
Excellence*



IF WE WANT TO SUCCEED – WE MUST SUCCEED  
TOGETHER !

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Component manufacturers  
Equipment manufacturers  
Distributors  
Workshops  
A/C Specialists





# CLOSING THOUGHT !

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- ▶ The human mind is like an umbrella



- ▶ Both are only useful when they are open !!!

Thank you for your attention today



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